

Strategic Plan Summary

In 1997, the Foundation's Trustees approved a new Master Plan for Monticello that covers the ten-year period from 1997 to 2006, with general goals for 2023, the commemoration year of the Foundation's 100th anniversary. Monticello's first master plan --approved in 1988-- was organized explicitly to advance the Foundation's mission of preservation and education, and guided the Foundation successfully through such important initiatives as the restoration of Monticello's roof systems, the celebration of the 250th anniversary of the birth of Thomas Jefferson in 1993, and the completion of its first major fund-raising campaign. All priorities of that plan were met, including the early realization of the International Center for Jefferson Studies, which was then a long-term goal, foreseen for the 21st century.

Monticello's new Master Plan builds on the previous plan and describes the Foundation's commitment to providing a more historically accurate presentation of the Monticello plantation and to returning Monticello to its appearance during Jefferson's retirement. It outlines nine broad priorities: Preservation and Maintenance: Taking Proper Care of What We Have; Restoration: The Return of Monticello's Vanished Landscape; Interpretation: A Comprehensive Plan and Global Outreach; New and Expanded Facilities; African-American and Plantation Life: A Scholarly, Inclusive Approach; Archaeology: A Unique Treasure Protected, Deciphered, and Disseminated; Monticello's Environs: Securing the Physical World Nearby; Staff, Operations, and Equipment: A Cycle of Enhancement; and The Revenue Base: Expanding the Requisite Financial Resources. The Master Plan includes a chart showing the phased implementation of these priorities and lists specific goals under each heading.

Preservation and maintenance of the Foundation's most important artifact, the main house and grounds, will remain the highest priority. Restoration will move into a new phase with the removal of modern, non-historical intrusions and with the recreation of more of the dependencies and the landscape elements that Jefferson knew. In support of its educational mission, the Foundation is now developing a comprehensive interpretive plan for the entire plantation that will include a model program for telling the story of African-American and plantation life at Monticello. The reassessment of Monticello's rare archaeological collection and the archaeological survey will deeply affect the museum's interpretation and is critical to the success of the plan.

The Master Plan also calls for new state-of-the-art facilities to advance these priorities. In June 2003, after two cycles of site and facilities planning, the Foundation's board approved a "Three Campus Plan," which establishes a core stewardship of 850 acres and three nearby areas for the Foundation's scholarly, administrative, and visitor programs. The scholarly campus at Kenwood, one-half mile past the entrance to Monticello, is already in place and includes the International Center for Jefferson Studies and the Jefferson Library, dedicated on April 13, 2002. The Foundation recently acquired 5.5 acres for the administrative campus, which will be located on property just a few steps away from the Jefferson Library, where many of the Foundation's scholar-administrators have ongoing research projects in place. An administrative center will not only accommodate a growing staff, but it will also enable the Foundation to remove present staff offices from such historic areas as the second floor of the main house, where the Curatorial Department is now located. With the addition of the administrative campus, all administrative functions will be centralized for the first time ever, and state-of-the-art facilities for archaeology and curatorial conservation, as well as meeting space for staff and Trustees will be included. Finally, a new Monticello visitor center and the Carl and Hunter Smith History Center will be built at the base of Monticello mountain at the

existing shuttle station. The new visitor center will contain space for permanent and changing exhibits and programs, provide enhanced visitor amenities, and allow for visitor education and orientation upon arrival. The Carl and Hunter Smith History Center will add new space for the popular *Study Tours and* provide the Education Department with new exhibition space and technology for program development and hands-on learning. On November 6, 2003, after a nationwide search, the Foundation selected the architectural firm Ayers Saint Gross of Baltimore to advance these compelling dreams. The Foundation has raised more than \$80 million in the "Jefferson Lives" campaign, with a goal of \$100 million by 2005, to support the priorities of the Master Plan.

The Master Plan also has explicit long-range goals up to the celebration of the 100th anniversary of the founding of the Thomas Jefferson Foundation in 2023. The Foundation's plan is to position Monticello so that its mission of preservation and education will continue to be advanced by human and financial resources, and by cutting-edge knowledge and technology. To guide its commitment to using information technology as a tool to achieve its mission, the Foundation recently approved an information technology (IT) addendum to the Master Plan. This addendum specifies the IT infrastructure investments required to support the extensive portfolio of IT-intensive projects that the Foundation is sponsoring in the next five years. Currently, the Foundation is focusing its technology efforts on several large scholarly projects based in its Archaeology, Editorial, and Library departments. These projects utilize information technology to build access to collections and data relevant to all aspects of Thomas Jefferson's life, times, and legacy. The aim is to enable staff, scholars, teachers, and students to analyze information in creative new ways. The Foundation's most ambitious IT-based knowledge management endeavor is the Thomas Jefferson Portal, which aims to provide scholars and enthusiasts with a web-based search engine that accesses all Foundation scholarly information and repositories, irrespective of format, ownership, or location, in order to provide the ability to create cross-disciplinary research and analysis. The Foundation also launched a streaming media site in 2002, with the support of the Institute of Museum and Library Services. The streaming media site enables the Foundation to build access to its programs and events by making them accessible, in a freely available format, directly on the Monticello web site. Subsequent revisions to the plan on information technology will be made on a five-year rolling basis. All of these long-term goals will provide a compass for the Foundation in planning the best course to reach its current priorities.

NARRATIVE

1. Project Design

DESCRIPTION

Thomas Jefferson preserved voluminous records of his intellectual interests. These take many forms: catalogs of his various libraries, lists of books to acquire, recommended reading lists, notes in commonplace books, and a multitude of comments in his prolific correspondence. These provide a wealth of information on what he read, what he valued, what influenced him, and in sum, what contributed to the foundations of his thinking. As a result of this rich record, the development of Jefferson's library collections can be tracked to an extraordinary extent. Moreover, Jefferson's intellectual standing and his wide sphere of influence makes this information relevant and useful in a wider cultural and political milieu.

GOAL

The goal of the Thomas Jefferson's Libraries project is to compile, catalog, and collate for the first time, data on 7,500 book titles owned and used by Thomas Jefferson. The data, to be made available worldwide for analysis and interpretation, will be derived from the following manuscripts and printed lists:

- Shadwell Library
- 1783 List
- 1789 List
- Great Library
- Library sold to Congress, Sowerby catalogue (E. Millicent Sowerby, *Catalogue of the Library of Thomas Jefferson*. 5 v. Library of Congress: 1952-1959)
- Library sold to Congress, Trist list (published as *Thomas Jefferson's Library: a Catalog with the entries in his own order*. Library of Congress: 1989)
- Poplar Forest Library, Leavitt Catalogue.
- Retirement Library

With the exception of the Sowerby catalogue, all of Thomas Jefferson's booklists are in short title format and some are manuscripts in Jefferson's own hand, never before transcribed. These titles will be verified and brought into conformity with Machine Readable Cataloging (MARC) format for internet delivery through the Thomas Jefferson Portal (TJ Portal) online catalog.

DESIGN

The project will be accomplished in five phases that have been defined by conducting a pilot project. The pilot entailed complete processing of 350 items representing the entirety of Thomas Jefferson's "Philosophy--Geography--America" subject classification. Processing during the pilot indicated that the most efficient and cost-effective means to complete this project will be to combine internal staff skills with external service providers' expertise. Thomas Jefferson Foundation staff will coordinate all activities and guarantee quality control at every stage. Specialized historical and bibliographic consultants will carry out the editorial and technical processing.

The project's scope and methods are presented at the Thomas Jefferson's Libraries Project Home Page, <http://www.monticello.org/library/tilibraries/index.html>. From this page, the following explanatory documents are available:

- | | |
|--------------------------------|----------------------------------|
| • About the Project | • Related Links |
| • List of Libraries Documented | • Searching the Database |
| • Editorial Apparatus | • Project Questions and Feedback |

Sample bibliographic records are available in the TJ Portal, <http://tjportal.monticello.org/>, by searching "Thomas Jefferson's libraries" -- including quotation marks.

PHASES

First Phase. Analyze manuscripts and printed sources containing information about book titles that Thomas Jefferson owned, and compile a Pro Cite database. Fields are established for standard bibliographic data and specialized information relevant to Thomas Jefferson's books, including transcriptions of his own notations.

Second Phase. Convert ProCite records into Machine Readable Cataloging (MARC) format. The ProCite field structure has been designed to facilitate this mapping process. (See ATTACHMENT: "Mapping Schema: ProCite to MARC")

Third Phase. Match titles to existing records derived from bibliographic utilities, primarily OCLC, to provide full sets of authorized name and subject terms. Titles that cannot be matched with certainty will be assessed by bibliographic and historical scholars to clarify title, author, and imprint information; when titles cannot be matched definitively to existing records, original cataloging records will be created. (See ATTACHMENT: "Sample MARC Record")

Fourth Phase. Link holdings information to specific records to reflect current ownership and availability of titles. The primary set will be the 1,000 titles acquired to date by the Monticello curatorial staff as Thomas Jefferson's reconstructed library. Holdings of other libraries -- notably, Library of Congress, Massachusetts Historical Society, and University of Virginia, and libraries owning Thomas Jefferson's own copy of a title -- may be added in the future.

Fifth Phase. Integrate into the bibliographic records editorial and historical commentary, principally the extensive notes created by E. Millicent Sowerby in her landmark *Catalogue of the Library of Thomas Jefferson*. There are Sowerby notes for most of the nearly 5,000 titles in the 1815 sale to Congress. Recent scholarship has generated further illumination, and this will also be included, with attributions. Permission to include full *text* of the Sowerby notes has been obtained from the Library of Congress.

2. Grant Program Goal: To Sustain Cultural Heritage

The project will provide, for the first time, a complete record of the books, the intellectual capital, that Thomas Jefferson compiled, used, and shared throughout his lifetime. This information will illuminate the significance that his books represent as a source of inspiration and insight. Jefferson was a founding father of not only American politics, but also of its philosophical, scientific, and artistic cultural foundations, and the intellectual breadth evident in his libraries is of great value in revealing the characteristics of this country's heritage. The full scope of his libraries will be accessible to students, teachers, scholars, and all persons interested in the history of America's Colonial and Federal periods. This information will be retrievable in numerous ways, with multiple searching and sorting options, and with applications to lines of enquiry from every facet of American cultural heritage.

Thomas Jefferson and his contemporaries saw books as a core element of the European and American intellectual foundations upon which thinking, planning, and acting is based. Several quotations illustrate this point:

- [TJ to James Madison, Sep. 1821] "Books constitute capital. A library book lasts as long as a house, for hundreds of years. It is not, then, an article of mere consumption but fairly of capital, and often in the case of professional men, setting out in life, it is their only capital."

- [T J to Henry Lee, 1825, regarding the Declaration of Independence] "Neither aiming at originality of principle or sentiment, nor yet copied from any particular and previous writing, it was intended to be an expression of the American mind, and to give to that expression the proper tone and spirit called for by the occasion. All its authority rests, then, on the harmonizing sentiments of the day, whether expressed in conversation, in letters, printed essays, or in the elementary books of public right, as Aristotle, Cicero, Locke, Sidney, &c."
- [Benjamin Franklin in his *Autobiography*, 1771, regarding the Library Company of Philadelphia] "This was the Mother of all the North American Subscription Libraries now so numerous. It is become a great thing itself, and continually increasing. These Libraries have improved the general Conversation of the Americans, made the common Tradesmen and Farmers as intelligent as most Gentlemen from other Countries, and perhaps have contributed in some degree to the Stand so generally made throughout the Colonies in Defense of their Privileges."

The project's information will be created within a sustainable electronic environment that guarantees continued and expanded access. The data standards and the software tools to be utilized are proven in their adaptability to ensure long-term viability. In addition, the information framework is designed to accommodate changes and expansion in the future. Further research resulting in new knowledge about Thomas Jefferson's libraries will be readily added, and other bibliographic compilations from the Founding Fathers era could also be included. Exciting prospects present themselves for making correlations between key historical figures and the published sources that they used. Connections may be constructed between titles owned by Jefferson and James Madison, James Monroe, John Adams, George Washington, et al.; titles held by the Library Company of Philadelphia, the College of William and Mary, and other 18th century institutions may also be analyzed. The project is designed, therefore, to contribute to a sustainable -- a vital and dynamic -- body of accessible and expandable cultural information.

3. Project - How the Project Fits into Strategic Plan and Mission

The project supports one of the two key elements of the Thomas Jefferson Foundation's mission: Education. Access to information about Thomas Jefferson is fundamental to innovative teaching and creative research, and a premise of the Foundation's planning initiatives is that "scholarship drives the mission." This project will create and provide wide access to new information, thereby advancing Foundation-wide priorities. It also addresses a primary goal of the International Center for Jefferson Studies (ICJS), the research wing of the Thomas Jefferson Foundation: meeting the informational needs of Jefferson scholars and research fellows.

Project relevance to the Foundation's planning and mission is exemplified in the following excerpts:

- [from the Master Plan, 1997-2006 (June 1997). Mission Statement]. "The Foundation has a unique opportunity to fulfill its mission. The possibility for a "living memorial" rests upon an unusually rich combination of resources: ... (3) the abundance of evidence available in both a literary and a material sense - all of which makes possible documentation and interpretation at Monticello beyond the reach of most historic sites."
- [from the Master Plan, 1997-2006. Highest Priority Goals]. Development of new technologically-supported Jeffersonian research tools....
- [from the Master Plan, 1997-2006. Long-Range Perspective]. The International Center for Jefferson Studies will be well established as the premier resource for Jefferson studies worldwide. ... A shared database will merge research files.
- [from the International Center for Jefferson Studies Strategic Plan, 2001-2005 (March 2001)] initiate a major expansion of web-based research/educational resources and online services.

Thomas Jefferson's Libraries project data will facilitate original research by Foundation staff to expand the interpretive programs and support educational outreach. Independent scholars and Fellows of the ICJS will be able to develop new lines of enquiry based on the expansive content, retrieval capabilities, and potential for data correlation.

4. Strategic Plan - Process and Financial Resources

The Thomas Jefferson Foundation's Master Plan, 1997-2006, is the second such Plan, and it builds upon the successes of the first Plan (1988-1993). The planning process was undertaken by directive, and with input and final approval, from the Board of Trustees. The current Plan includes contributions from nineteen departments and task forces with sections authored by several dozen staff members. The Plan remains the ultimate blueprint for Foundation actions and priorities. To extend the Plan's relevance, the Foundation has augmented its assumptions and priorities by creating subsequent planning documents covering finance and business, information technology, site and facilities, interpretation, training, and scholarship programs. Knowledge management plans and priorities have also been addressed. The TJ Portal in its formative stages has been described, and one document reveals how the Thomas Jefferson's Libraries project goal is on target to fulfill information technology and scholarly goals through the TJ Portal initiative. (See ATTACHMENT: "Development of the Thomas Jefferson Portal")

All Thomas Jefferson Foundation projects and departmental activities are devised and developed by the professional and scholarly staff, and all are framed within the short- and long-term financial profile developed by the Foundation leadership in conjunction with the Board of Trustees. Special initiatives, expansions and changes in programs, capital projects, etc. are all built upon annual operating budget figures and financial projections based on reliable predictors. Projects are not undertaken without resources in-hand. The record of balanced budgets for the past twenty years, almost complete avoidance of deficit spending, and creation of substantial endowment funds are strong indicators of fiscal well-being, founded on good planning and management.

5. Project - Appropriateness for Institution, Audience

INTENDED AUDIENCE

Two audiences whose needs will be met by this project have been defined. First, the scholarly community, with representatives from the many subject disciplines encompassed within the scope of Thomas Jefferson's libraries, includes teachers and students, researchers and curators, librarians and archivists, collectors and bibliographers, museum and historical agency professionals, and all persons interested in compiling and interpreting the record of American historical heritage. The following list enumerates elements of this audience as represented by a sampling of the groups that have visited and used the Jefferson Library in the past twelve months:

- ICJS research scholars and fellows
- Foundation departmental staff: Interpreters, Education, Curatorial, Research, Public Affairs, etc.
- University of Virginia library, faculty, and student groups
- Albemarle Charlottesville Historical Society.
- Gilder Lehrman Teachers Seminar. Monticello-Stratford Hall Teachers Seminar
- "Adventure of the American Mind" Teachers Seminar
- Council for America's First Freedom
- Association of Independent School Librarians
- Virginia chapters: Special Libraries Association, Art Libraries Society, and Visual Resources Association
- Monticello High School Scholars
- Center for Palladian Studies

The multifaceted nature of this audience and the diverse scope of uses to which the project's data will be put are reflected in the letters supplied by individuals representing the interests of some of the Foundation's institutional partners. (See ATTACHMENT: "Endorsement Letters")

The second audience is the more than one-half million individuals who visit Monticello annually by way of the Internet. Since its inception in 1996, the Thomas Jefferson Foundation's web site has been used by an increasingly large number of visitors each year. The number in 2003 is almost 550,000 individuals (up 12% from 2002, up 28% from 2001) with each visit lasting an average of 13 minutes (up from 9.5 minutes in 2002). These numbers reflect an upward trend attributable to the expanding scope and quality of the web site's content. The addition in mid-2002 of the TJ Portal catalog and search engine has contributed to meeting the needs for online research support and educational materials. Web usage data for the TJ Portal is only partial, but numbers from the final eight months of 2003 (April-December) indicate 17,815 visitor sessions during which 64,251 pages were viewed. Use of the Portal is increasing as knowledge about it expands through the following means:

- Educational sessions with hands-on demonstrations (75 to date)
- Presentations at geographically dispersed conferences and workshops
- Updates published in the quarterly *ICJS Bulletin*
- Communication with colleagues at one hundred affiliated historical and cultural agencies
- Postings on professional association list serves

ASSESSMENT OF AUDIENCE NEEDS

In addition to the endorsements expressing interest (and need) from the scholarly audience already cited, there has been systematic assessment of users' needs through compilation of reference transactions. Prior to the founding of the Jefferson Library in April 2002, several hundred research queries from external sources were submitted annually to the Thomas Jefferson Foundation. Since its founding, the Library has provided reference and research services to a steadily increasing number of patrons: 3,445 transactions have been recorded in the past 18 months. Nearly 40% of these inquiries are received through electronic communication. To enhance this outreach service, and to log the questions and answers, the "Ask a Reference Question" web form was launched (<http://www.monticello.org/library/reform.html>) in January 2003. In the past twelve months over three dozen questions have been submitted regarding Thomas Jefferson's books and libraries. The following types of queries have been answered with as much specificity as possible, but always with the caveat that there is not yet a complete catalog of all Jefferson book titles:

- Did Jefferson have a particular author or title? (e.g., Rabelais? Tasso? The Koran?)
- Who were Jefferson's favorite authors? Did he read fiction? Poetry?
- What books did he recommend to people?
- What books did he own that gave him information about a particular topic (e.g., China and the orient? health and medicine? grapes and wine?)

(See ATTACHMENT: "Sample Research Queries Related to Thomas Jefferson's Books")

SERVING THE AUDIENCE

To meet the varied (and not entirely predictable) needs of the multifaceted audiences described above the bibliographic information and editorial commentary will be structured and standardized within the highly flexible environment provided by the TJ Portal. This research tool is built on the same software system in use at other specialized research agencies: Boston Athenaeum, Hagley Museum and Library, Historic Deerfield, Library of Congress, Massachusetts Historical Society, National Gallery of Art, National Geographic Society, Pierpont Morgan Library, etc.

The adaptability of the system to serve many kinds of enquiries from people with a variety of interests is best exemplified with some samples:

- Search "Louisiana or Mississippi" to identify sources regarding western lands and exploration
- Specify "1783 list" to ascertain authors and titles that influenced Jefferson as a young man
- Determine which of the classical authors he owned and which editions
- Retrieve titles on landscape design and gardening by searching "Fine Arts--Gardening"
- Find titles on religion, including Bibles, that he owned.

In addition to support for many searching strategies, retrieval options offer the results delivered in variable orders: alphabetical by title or author, chronological or reverse chronological order; "limiting" parameters may also be utilized to find items in specific languages or published in specific years.

6. Project - Resource: Time & Budget

This will be a 36-month project requiring an expenditure of \$135,300. This amount of money is being requested from IMLS, and the Thomas Jefferson Foundation will provide a 1: 1 in-kind match. The funds provided by IMLS will support external service providers' fees, while the Thomas Jefferson Foundation contribution will be in the form of staff participation, technology resources, and overhead. A recent study of time expended by Jefferson Library staff to fulfill specific functions confirmed that the FTE percentages specified for this project are in accordance with time utilized for "special projects."

The schedule, finances, technology, and personnel specifications included in this proposal are based on the successfully completed pilot project. The labor-intensive nature of the work in all five phases, including monitoring and quality control for all steps, dictate that a three-year schedule is realistic and feasible. The pilot demonstrated that the specialized historical and bibliographic knowledge required to guarantee a superlative outcome will be achieved by meshing the data management and project administration skills of Foundation staff with editorial, bibliographic, and technical expertise of external consultants. The technology infrastructure and equipment resources required to conduct this project are already in hand. (See ATTACHMENT: "Project Workflow")

7. Project - Resources: Personnel & Technology

PERSONNEL

A critical path to completion of the project has been designed based on the information derived and the methods and tools developed during the pilot project. Communication loops between staff members and external consultants have been tested. Foundation staff will be involved in every phase in the following roles: management of schedule, budget, and communication, and bibliographic verification (Jack Robertson, Foundation Librarian), quality control and decision-making when issues arise regarding accuracy and authority of information (Endrina Tay, Coordinator of Cataloging and Metadata). Robertson is the inaugural Foundation Librarian and has participated in devising information management projects and the implementation of the TJ Portal. Tay is the first holder of her position, and she has created policies and implemented procedures for expanding content in the online catalog and enhancing data records. The FTE percentages designated for the project for all current staff members are equal to the amount of time currently allocated to special projects. No additional staff will be required.

Thomas Baughn and John Barden have both worked on bibliographical projects at the Thomas Jefferson Foundation in the past, and both participated in the pilot project. They each have historical, bibliographical, and editorial expertise in the field of early American history, and they each have extensive knowledge of Jefferson's books and libraries. Douglas L. Wilson will provide advice, as consulting editor, on problematic bibliographic issues. He has researched and published widely on Jefferson's libraries. The

Donohue Group, Inc. (DGI) has provided technical processing services to the Foundation in the past, and the firm has completed projects for other cultural and historical agencies including Massachusetts Historical Society, American Antiquarian Society, French Library and Cultural Center, and Andover-Harvard Theological Library. External consultants have been selected to fulfill key roles based on qualifications, experience, and recommendations; project-relevant credentials are highlighted in their resumes and qualifications documents.

TECHNOLOGY

The project's goal to provide intellectual access through sophisticated search and retrieval mechanisms entails use of technology and advanced applications of information management. The data will be structured in Machine Readable Cataloging (MARC) format, in accordance with established standards such as the Anglo-American Cataloging Rules Revision 2002 (AACR2r). Library of Congress Subject Headings (LCSH) will provide access to records based on a controlled vocabulary and will introduce a level of searching previously unavailable to researchers and scholars. Through the innovative use of local series headings, important relationships between various titles (e.g., which books Jefferson owned at different times in his life), and information regarding a specific title (e.g., whether Jefferson sold a particular title to Congress and then repurchased a copy later in his retirement years), are now captured for use and further analysis. The adaptability of the MARC platform will allow for future growth of intellectual content through the inclusion of additional data from other related sources including Jefferson's correspondence and information from sources contemporary to Jefferson, such as booklists, library catalogs, and newspapers.

Every data element within the MARC record will be searchable in single- or multiple-term queries.

Information enhancements designed into the project include:

- Authorized form of authors' names-with links to all titles by the same person
- Authorized subject headings-with links to all titles analyzed by the same term
- Uniform titles for variant editions-to link all versions of the same work
- Edition notes and contents summaries
- Notation of the Thomas Jefferson library or libraries in which the title was included
- Indication of where Thomas Jefferson placed each title within his subject classification system.
- Transcription of Thomas Jefferson's own notes for the title
- Link to editorial "notes and commentary" including the full text of Sowerby's notes

EXTENSIBLE MARK-UP LANGUAGE (XML)

Transcriptions of the notes and commentary linked to the titles in the Thomas Jefferson's Libraries project will be delivered through Monticello's main Web site. The transcriptions are being encoded using the Extensible Markup Language (XML) with a tag set derived from the Text Encoding Initiative (TEI) standard. The encoding scheme will provide the base structure for the documents and allow for future expansion and refinements. Initially, the XML-encoded transcriptions will be transformed into HTML pages using Expat, an open-source XML parser, and PHP, an open-source, server-side scripting technology. The decision to use these two technologies was based on expertise and resources available in-house and on their ability to produce pages that are compatible with all of the currently popular web browsers. Use of Expat-PHP does not preclude future use of XML's Extensible Stylesheet Language Transformation (XSL T) software, which allows for far more sophisticated "transformations" of XML, but is not yet fully compatible with all Web browsers. Visitors to the TJ Portal and Monticello's web site will be able to access these transcriptions in two ways. First, direct hyper links to the appropriate transcriptions will be provided through the bibliographic records. Second, the transcriptions can be searched and accessed using a specialized version of the full-text search service on Monticello's main web site. This will allow retrieval of multiple notes that fulfill a search query for a name or term. (See ATTACHMENT: "XML Mark-Up Schema")

Thomas Baughn, editorial researcher and transcriber

Cost Breakdown for professional services provided in the preparation of the transcription of the Great Library and 1789 manuscripts with the compilation of those transcriptions together with the Sowerby reference number and the previously transcribed records of, Retirement Library Catalogue, Poplar Forest Catalogue, and Trist Manuscript, all of which will constitute the Procite database of Thomas Jefferson's Libraries.

Line items:

Transcription and compilation in ProCite (24 months) 40,000.00
 Proofreading Assistance 7,500.00
 Travel Costs (one 2-day trip per calendar quarter) 4,000.00
 Consultation Time (200 hours billable quarterly) 4,500.00

Total \$56,000.00

Donohue Group, Inc. data mapping and generation of bibliographic (MARC) records

Project roles and line items:

Map and convert data from ProCite to MARC 15,500
 Match titles with existing online MARC records
 Searching 8,500 items II at \$2 per 17,000
 Download 7,500 verified records from OCLC II at \$2 per 16,000
 Sub Total \$33,000
 Provide XML mark-up for 5,000 Sowerby notes II at \$3 per 15,000

Total \$63,500

2.A. Convert bibliographic information from database (above) into MARC AND		2A) : 120 hours @ \$90 = TOTAL \$10,800.00
2.B. Match to existing bibliographic records - standard records from OCLC (or other).	5,000 titles validated against Sowerby	2B): 1250 hours @ \$45. 00 = \$56,250.00 OCLC charges = \$7,500.00 Travel and Expenses = \$2,000.00
2C. Process subset of items not noted in Sowerby which have sufficient data to search for bibliographic match	2,000 titles	TOTAL: \$65,750.00 or \$13.50 per title 2C): 1,000 hours @ \$45/hour OCLC charges = \$4,500.00 TOTAL \$49,500.00 or \$24.75 per title

John Barden, historical bibliographer

Project role: To identify, wherever possible, the full titles and specific editions of works in Jefferson's libraries from the partial information available in book lists and catalogs; where a specific edition cannot be determined, to suggest the narrowest range of appropriate editions.

Provision of electronic transcription of E. Millicent Sowerby's *Catalogue of the Library of Thomas Jefferson*.

Tasks:

- Receive partial title research requests
- Examine all TJ library lists for reference to this or similar works
- Examine TJ writings for references to work, perhaps including queries to editors of papers at Princeton and/or Monticello
- Search for corresponding titles in DCLC, NUC, and other bibliographic resources . Identify particular title and edition in question; alternatively, compile list of most likely possibilities and assess likelihood of each candidate
- Return results and supporting data
- Supply electronic files with complete transcription of Sowerby

Line Items:

Transcription of Sowerby notes for 5,000 titles \$14,000

Identify 1000 titles II at 1.00 hour per title: 1.00 hour II at \$27.50 per hour. Total: \$27,500.00

Total \$41,500